Enterprise Content Management Workgroup
Minutes
March 29, 2017
1:00 PM
Cogswell, Room 151

Attendees:

George Parisot, DLI

Carol Monroe, OPI

Elle Arredondo, OPI

Larry Krause, DOC

Teri Juneau, DOC

Tarek Haffer, DOR

Carol Schopfer, DOR

Patrick Miller, DOR

Bob Finstad, DOR

Audrey Hinman, SITSD

Marlo Conrady, SITSD

Chris Bernet, DLI

Kim Warren, DLI

Judy Kelly, DLI

Mike Bousliman, MDT

Steve Evans, Lexmark Kofax

Jeff Matthews, Lexmark Kofax

Staff Present:
Wendy Jackson, Jennifer Schofield

✆ **Real-time Communication:** Jodie Foley, Miranda Keaster, Sky Foster, Manuel Soto, Miranda Needham, Sue Leferink, Heather Hardman, Jerry Kozak, John Noble, Boah Kang

Welcome and Introductions
George Parisot welcomed everyone to the Enterprise Content Management (ECM) workgroup kickoff meeting. All attendees were introduced.

Business
Audrey Hinman stated that the ECM Workgroup will be attached to the Information Technology Managers Council (ITMC) and report workgroup activities in the monthly ITMC meetings. The structure of the ECM workgroup will mirror the Enterprise Information Technology Financial Workgroup (EITFW).
Mr. Parisot informed the group that Jennifer Schofield is the facilitator of the ECM Workgroup. Workgroup members should contact Ms. Schofield at jschofiled@mt.gov or Wendy Jackson at wjackson@mt.gov with any questions.

Discussion on Role and Activities of the ECM Workgroup
Mr. Parisot stated that the ECM Workgroup is intended as a collaboration tool to facilitate the sharing of information and ideas about how ECM is used by different agencies. This forum will allow for sharing of workflows, scripts, and communications regarding the ECM environment. The ECM vendor, Lexmark/Kofax, will participate in this workgroup to answer questions and aid in the introduction of ECM across the enterprise.

Mike Bousliman stated that this workgroup will address ECM technical issues and business uses.
Carol Schopfer commented that agency demonstrations showcasing ECM business usage were very beneficial in the implementation of ECM in the Department of Revenue (DOR). Ms. Schopfer stated that DOR is willing to demonstrate their ECM program to aid others in their development.
Jeff Matthews commented the most common ECM usages are Accounts Payable (AP) and Human Resources (HR) applications. These are repeatable processes that can be shared between agencies without necessitating vendor involvement. ECM usage in workflows outside of AP can be addressed in this workgroup as well.

Steve Evans confirmed that all modules, currently owned by the state, can be utilized by any agency. ECM is most successful when an internal knowledge base is created by users. This will allow state users to more easily make and repurpose ECM scripts. An ECM forum where workflow processes could be broken out and shared would allow for greater understanding of workflow form and function. Lessons learned from other users may be shared in this format and serve as valuable learning tools for the successful implementation of ECM. Training material created by Lexmark/Kofax can be refined and posted to the ECM SharePoint site to provide

training materials, specific to State of Montana ECM usage. Agency demonstrations will also be beneficial in providing business use ideas for other agencies looking to implement ECM. Mr. Matthews stated that Lexmark/Kofax will provide onsite support for agency ECM implementation and information regarding other tools that might be helpful in specific applications. Lexmark/Kofax provides support for regional user groups across the country and will extend this support to the ECM workgroup.

Mr. Bernet gave a brief overview of the Department of Labor and Industry (DLI) ECM usage. DLI is in the process of their third ECM division rollout. ECM Document Composition software is being implemented in the Unemployment Insurance Division to build letter templates. This will allow DLI to automate and standardize letters. These templates can be customized to fit various scenarios and business needs. This template also contains an option to lock editing rights to eliminate inadvertent changes to the letter template. The ECM Document Composition software will give DLI the ability to perform easy updates to a large volume of letter templates. Perceptive does have the potential to generate e-forms but DLI has yet to explore this option. Perceptive also contains an option for workflow approval. Mr. Bernet suggested that DLI provide guidance to agencies considering their first implementation of ECM regarding utilization, lessons learned, and DLI's use of Perceptive.

Ms. Arredondo stated that the Office of Public Instruction (OPI) is planning on implementing ECM in AP, contracts, and requisitions.

Ms. Hinman commented that the Department of Health and Human Services (DPHHS) will utilize the Document Composition software in Child and Family Services as well.

Mr. Bousliman stated that the Department of Transportation (DOT) has HR needs that could be addressed through ECM. Kim Warren commented that DLI plans to utilize ECM to address their HR needs as well. Mr. Parisot stated that DLI will utilize ECM to migrate physical versions of Personnel Action Forms to an electronic format. These electronic forms can be shared with the enterprise.

Q: Ms. Warren: Is State HR considering the integration of ECM in their processes?
A: Ms. Conrady: We are not sure. The only contract SITSD has with State HR at this point is regarding job descriptions.
Mr. Matthews stated that there is a Lexmark/Kofax HR specialist who is available to discuss options and applications should State HR wish to moved forward with further ECM implementation.

Mr. Bousliman recommended key business units be integrated into the ECM workgroup to provide a greater awareness of business needs. Mr. Parisot confirmed the ECM workgroup is open to both Information Technology (IT) and business personnel.

Mr. Parisot stated a Chair and Vice Chair will be nominated by the workgroup. These individuals will work with SITSD Support Staff to facilitate workgroup meetings and make monthly reports to the ITMC. Mr. Parisot suggested the workgroup meet on a bi-monthly basis, subject to an increased frequency if the need arises. Ms. Schofield informed the group that an ECM internet site has been developed and is attached to the ITMC website. Meeting minutes and materials for the ECM workgroup will be posted on this site. An ECM SharePoint site will also be developed. ECM members can provide input regarding the ECM SharePoint site content.

Future Agenda Items
Mr. Parisot commented that a test environment for script sharing and development has been discussed with Lexmark/Kofax. Mr. Matthews stated that a test environment can be set up, containing all state-owned modules, as a 6-month temporary license that is repeatedly extended. This environment would contain all state-owned modules.

Mr. Parisot stated that an update from the State Information Technology Service Division (SITSD) regarding FileNet migration and the ECM environment should be a standing item on the ECM agenda. In addition, the agenda will include updates from agencies regarding the progress of ECM projects and software tools. Mr.

Parisot remarked that the ECM workgroup will coordinate training efforts and schedules to provide other agencies access to relevant training.

Patrick Miller commented that the Department of Revenue (DOR) is implementing Perceptive to develop a full solution for Office of Dispute Resolutions. This is being used in conjunction with the DOR EPass My Revenue service. Perceptive will allow DOR to interface with taxpayers on relevant forms and make these forms easier to find. DOR has used Perceptive to develop three web forms which allow data to enter the Perceptive environment.
Q: Larry Krause: Is the ECM environment ready for agencies to move forward with implementation?
A: Ms. Hinman: The environment is almost completed. The State Information Services Division (SITSD) is waiting on a few pieces from Lexmark/Kofax to facilitate the migration of all programs onto the ECM environment.
Q: Terrie Juno: What is the price to get AP implemented and what are the appropriate steps to begin this process?
A: Mr. Matthews: Many agencies have hired Lexmark/Kofax to build these services. Agencies can also build services themselves.
Q: Mr. Krause: Is there still a training requirement before agencies can receive administrative rights to the ECM environment?
A: Marlo Conrady: SITSD and Lexmark/Kofax strongly recommend completion of training before agencies receive administrative rights. This training is available offsite and online.

Mr. Matthews stated that the Fundamentals for Administrators training is a four-day course. Individuals are recommended to attend the class live online, or on-site at the Kansas City location. An assessment can be completed to address agency needs. Lexmark/Kofax can then develop a price estimate for building services and identify training needs. Agencies can also hire SITSD to build these services if they so choose.
Ms. Conrady stated that it would be beneficial for agencies to complete the Lexmark/Kofax needs assessment to identify options and business needs.
Judy Kelly stated that the needs assessment also aids in developing a price estimate for the development of services.
Ms. Schopfer stated that DOR staff successfully build ECM Services with the knowledge gained from the Fundamentals for Administrators training.
Q: Mr. Bousliman: Is this training targeted toward administrators or developers? What kind of skill set would be most appropriate to attend?
A: Ms. Kelly: Individuals from all areas of the business spectrum can benefit from this training. Fundamentals for Administrators attendees should have significant technical aptitude. DLI has sent both Network Administrators and Developers to this training.
Q: Mr. Krause: Is there an opportunity for sharing of knowledge and resources between agencies for the development of services?
A: Mr. Parisot stated that the function of the ECM Workgroup will be a forum for collaboration and information sharing. Agencies seeking state support to build ECM services should utilize the Professional Services of SITSD.

Mr. Matthews stated Molly Martin is the Lexmark/Kofax designated Solution Design Expert for the state of Montana. Ms. Martin will support agency ECM development if they choose to utilize Lexmark/Kofax to build services. This will reduce development time and guarantee quality of services.

Mr. Matthews announced that the Lexmark/Kofax Inspire Conference will be held April 23-26, 2017 in Nashville, Tennessee. This conference is geared towards the end user and will showcase the Lexmark/Kofax product line. Product demonstrations will be presented by Lexmark/Kofax staff and customers to showcase ECM business solutions. This forum will allow attendees to interface with other Lexmark/Kofax customers and discover how others are utilizing ECM. A resource room will be available at the conference where Lexmark/Kofax staff and product managers will offer consultant services for technical issues, business solutions, and product demonstrations.

Action Item: CIO Support Staff will solicit nominations via email for the ECM workgroup Chair and Vice Chair positions.
Action Item: CIO Support Staff will schedule the next ECM meeting for the end of May, 2017.

Next Meeting
May 31, 2017

Adjournment
The meeting was adjourned at 2:03 PM